Subject: Documenting Notes in the License Mini Panel	Number: 650-86
Effective Date: DRAFT 10/30/2020	

PURPOSE:
To provide instructions on when and how to document clear, concise notes in the License mini panel under the Licensee Edit module of the Central Registry for reference on a certification update or correction. This is used by EMSA billing, BLS Coordinator and by other certifying entities for clarification purposes.

REFERENCE:
- Procedure 650-58 Renewing an EMT Certification
- Procedure 650-68 Reinstating an Expired EMT Certification

GUIDANCE:
When to document notes in the License mini panel:
- Erroneous expiration date - an expiration or effective date may have been entered incorrectly before July 1, 2017, when certifying entities had access to change date fields. If this affects their certification, employment or EMT card, notes will assist with clarification. The certifying entity that issued incorrect dates will need to document notes as to what occurred for reference and clarification to EMSA and other certifying entities who may work with the certification in the future.
- Renewal back dating – if an EMT met all requirements before their expiration date, but the certifying entity did not enter the certification into the Registry until after the expiration date (but within the 14 days required in regulation). The certifying entity will choose the "reinstate" tab to process the certification even though it is a renewal, send a helpdesk request to EMSA with date correction needed, document notes in the license mini-panel explaining that requirements were met on time for the renewal, but entry to the registry was delayed. This will assist when other staff or certifying entities see the License mini panel that will display the reason changed to "reinstatement" and an inaccurate checklist history.
- Non-entry to the Registry – if an EMT was processed and issued an EMT card by a certifying entity, but the certification was not documented in the Central Registry.   The EMSA BLS Coordinator will need to be contacted to assist with the missing cycle and date corrections. The certifying entity will need to document notes as to what occurred for reference and clarification to EMSA billing staff, the BLS Coordinator, other certifying entities who may work with the certification in the future.
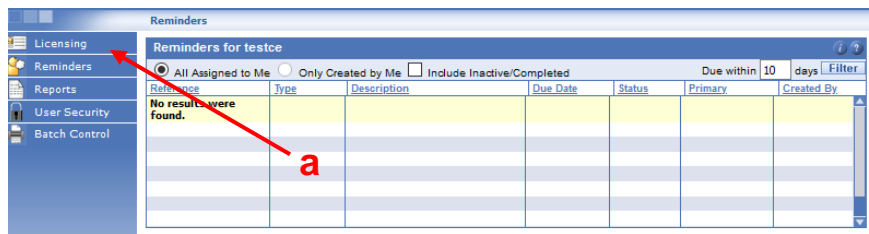
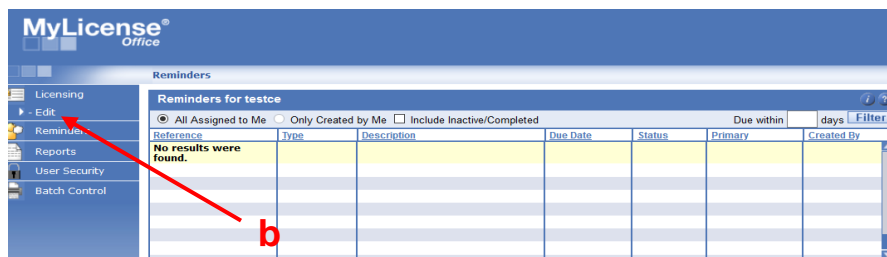| Subject: Documenting Notes in the License Mini Panel	Number: 650-86
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- Certification on the wrong EMT profile – when certification staff accidentally process a renewal or reinstatement on the wrong EMT profile. This may occur due to not cross-checking the name with the SSN, DOB, address, etc. The certifying entity will need to contact the EMSA BLS Coordinator to assist with revising the profile back to the proper prerequisite relationship, dates and status. The agency will need to document notes as to what occurred for reference and clarification to EMSA billing staff and the certifying entity in which the EMT is currently certified as the checklist history cannot be changed and will not reflect an accurate history.
- Withdrawn/Abandoned applications – when an EMT submits an application, it is entered to the Registry but left incomplete (pending) due to missing requirements or the EMT does not complete the process. The certifying entity will remove (withdraw) the application and choose the reason. Documenting notes in the license panel will assist other certifying entities when the EMT applies elsewhere and will assist EMSA billing.

PROCEDURE:

1. Once you are logged into MLO, click on the Licensing module (a) to see the Edit option.

In the left column of the Central Registry under Licensing, click > Edit (b).
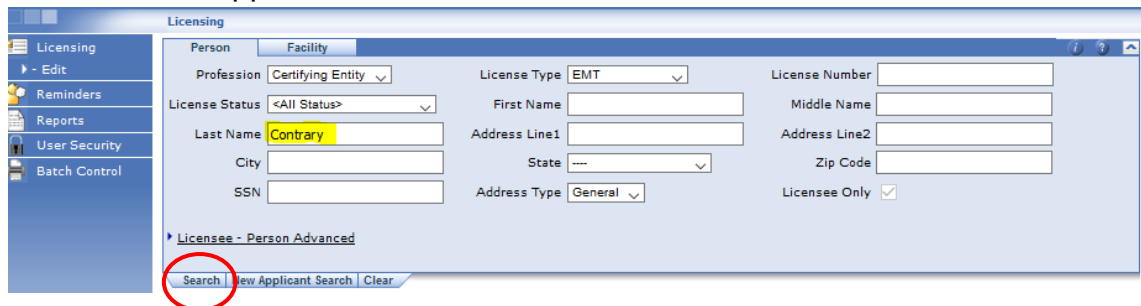
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2. Enter the EMT or AEMT certification number, name or SSN to pull up the person record. Use the **Search tab** (a) **NOT the New Applicant Search tab** which is used for initial applications.

3. Once the correct record is open, scroll down to the License mini panel (a) and click on the yellow notepad (b) in the top right corner of the panel.

You will see lines on the notepad if a prior note exists on this profile as shown below (c):

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4. You will see one of two options to ADD a note or remark. See the examples of these two possibilities in the screenshots below:

- **Add a new remark** if there is no prior note (a). **See Step #5 for instructions**.

OR

- **Add to an existing remark**. This is used if any previous remark/notes exist. It may be a new scenario, but you will still follow the procedure to open an existing remark (b). **See Step #7 for instructions**.

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5. **To add a new remark**, start typing in the "Add Remark" panel (a). Enter notes that are clear, concise and factual. Click *SAVE*.

6. This will bring you back to the License mini panel and will show that there are remarks in the yellow notepad (a).

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7. **To add a remark to a profile that has an existing remark**:
   - Click on a prior underlined note to add more or the most recent underlined note (a) to add a new one.
   - Then click the Clear tab (b) and type a new note. Clicking on clear does not delete the prior note, but removes it temporarily to add a new one. Once you save the note, both (or all) notes remain in the history. If you do not click "Clear," then the notes will duplicate and appear redundant.

License Summary

Profession	License Type	License Number	Applicant Number	Status	Date This Status	Reason Changed	Issue Date
Certifying Entity	EMT	E129359	205362	Active	02/09/2018	Administrative Error	06/28/2017

Remarks List

Date Last updated	Remarks	Updated By
02/23/2018 03:20:59 PM	EMT E129359 met all requirements on time prior to expiration 1/28/2018. Delayed ...	testce

Edit Remark

EMT E129359 met all requirements on time prior to expiration 1/28/2018. Delayed entry to the Registry; reinstate tab used so history will not reflect accuracy of renewal.

Sav | Clear

b

Back

- Start typing the new note (c) and once finished, click on SAVE.

Edit Remark

Corrected expiration date due to early renewal...

c

Save | Clear

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8. The final screen you will see when adding to an existing remark is the following which shows both remarks added. Once you are done, click BACK (a) to complete the process and return to the full profile in Licensing Edit.

For questions or support, send an email request to mlohelpdesk@emsa.ca.gov using the MLO_HELPDESK_KEYWORDS.

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